



ARC Contribution Splitting Request form

1. PERSONAL DETAILS

Name

Title Mr Mrs Miss Ms Other

Surname Givenname(s)

Date of birth Gender Female Male

Address street

Suburb State Postcode

Contact details

Home phone number Work phone number

Mobile phone number

Email address

2. RECEIVING SPOUSE DETAILS

Title Mr Mrs Miss Ms Other

Surname Givenname(s)

Date of birth Gender Female Male

Address street

Suburb State Postcode

Contact details

Home phone number Work phone number

Mobile phone number

Email address

3. DETAILS OF CONTRIBUTION TO BE SPLIT

A. Financial year ending

30 / 06 / YYYY

You should lodge your application between 1 July and 30 June following the end of the financial year in which the contributions were made. However, if your entire benefit is to be rolled over, transferred or cashed before the end of the financial year, you may apply to split contributions in the current financial year.

B. Taxed contributions to be split - these include superannuation guarantee and other employer contributions, salary sacrifice contributions and personal contributions for which a tax deduction is being claimed. Up to 85% may be split.

\$ OR %

C. Untaxed contributions to be split - these include personal contributions for which no tax deduction is being claimed and superannuation co-contributions, made up to and including 5 April 2007*. Up to 100% may be split.

\$ OR %

Please note that once you split your personal contributions with your spouse, you will not be permitted to claim a tax deduction for these contributions at a later date.

* Government legislation prohibits the splitting of personal after-tax contributions made after 5 April 2007.

4. PROOF OF IDENTITY

We require you to provide the below information and documentation regarding your identity prior to the contribution splitting request being processed. Please refer to the **Important Notes** section of this form for further details about the documents that can be provided and the certification requirements. Note that TAL will not accept documents that have been self-certified, certified by a family member or by a pharmacist.

Certified copy of your Driver's Licence or

Certified copy of your passport (photo page only) AND a certified copy of one of the following documents showing your current residential address: motor vehicle registration or insurance papers, property rates notice, property lease agreement, home insurance papers, utility bills (eg telephone, electricity or gas), bank or credit card statement. Note: These documents must be 12 months old or less.

If Passport or Driver's Licence are not available, please supply 1 document from **List A** and 1 document from **List B**.

List A

Certified copy of birth/citizenship certificate

Certified copy of Centrelink Pension Card

List B

Certified copy of Centrelink payment letter

Certified copy of a Government or Local Council Notice (less than one year old) with name and address (e.g. Australian Taxation Office notice of assessment or rates notice from council)

Certified copy of a concession card. The following concession cards are accepted: a Pensioner Concession Card, a Health Care Card or a Seniors Health Card

To avoid any delay in processing your contribution splitting request, please make sure you read the **Certification of personal documents** information in the **Important Notes** section of this form and the **Checklist for Certified copies** below.

Note: we may require other proof of identification prior to the release of your superannuation funds. TAL may request the original certified copy of documentation. Please keep it in a safe place.

Checklist for Certified copies:

- Has the person certifying the document set out the following?
 - full name (no initials)
 - signature
 - capacity in which they can certify the document (category 1-15 in the IMPORTANT NOTES section of this form)
 - daytime telephone number or business address to allow contact by TAL
 - date of certification (must be within 6 months of TAL receiving this form)
 - official stamp or Justice of Peace number if applicable.
- Has the person certifying the document written out the following wording (or similar) on the copy of the document? "I certify that I have seen the original documents and this copy is a complete and accurate copy of that original".

5. SPOUSE PAYMENT INSTRUCTIONS AND ELIGIBILITY DECLARATION

This section must be completed by the receiving spouse

I declare that at the date of this application I am the spouse of the applicant and I am:

less than my preservation age, OR

between my preservation age and 65 years and not retired

Please provide details of the complying superannuation fund to which you would like the contributions allocated:

Name of superannuation fund

Member number* Unique Superannuation Identifier (USI)*

ABN* RSE Registration number

Address of fund

Street

Suburb State Postcode

Fund contact number

* Make sure you provide the member number, fund USI and fund ABN.

I confirm that the information provided above is correct and confirm that I have read, understood and accept the Privacy Policy available at www.tal.com.au/privacy-policy

Receiving spouse's Signature

Date

6. CONTACT DETAILS

ARC Customer Service Consultants

Call 1300 209 088

Monday to Friday 9.00am - 5.00pm (AEST/AEDT)

Email: customerservice@tal.com.au

Website: www.arcmt.com.au

IMPORTANT NOTES

Temporary residents – conditions of release

An individual who has, at any stage, been a temporary resident (i.e. a holder of a temporary visa under the Migration Act 1958, other than a retirement visa holder, subclass 405 or 410) and who is not currently a citizen or a permanent resident of Australia or New Zealand, is only able to withdraw their superannuation benefits under limited conditions of release.

You are normally only allowed to access your benefits after you have permanently departed Australia. In order to access your benefits, you can apply online via the Australian Taxation Office (ATO) website.

Please visit www.ato.gov.au and look for the Departing Australia Superannuation Payment (DASP) online form. For more information, contact the ATO on 13 10 20 or +61 2 6216 1111 (if you are calling from overseas).

However, if you are still in Australia and one of the release conditions below apply to you, subject to Trustee assessment and approval, your benefits may be released:

- Death
- Terminal medical condition
- Permanent incapacity
- Temporary incapacity

Have you changed your name or are you signing on behalf of another person?

If you have changed your name or are signing on behalf of the member, you will need to provide a certified linking document. A linking document is a document that proves a relationship exists between two (or more) names.

IMPORTANT NOTES CONTINUED

The following table contains information about suitable linking documents.

Purpose	Suitable linking documents
Change of name	Marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office.
Signed on behalf of the member	Guardianship papers or Power of Attorney.

Certification of personal documents

All submitted copies of identification documents (including any linking documents) need to be certified as true copies by an individual approved to do so.

The person who is authorised to certify documents must sight the original and the copy and make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification and date.

The following people are authorised to certify copies of the originals as true and correct copies:

1. A person enrolled on the Roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner (however described);
2. A judge of a court;
3. A magistrate;
4. A chief executive officer of a Commonwealth Court;
5. A registrar or deputy registrar of a court;
6. A Justice of the Peace (JP);
7. A notary public for the purposes of the Statutory Declaration Regulations 1993; (see Note 1 below)
8. A police officer;
9. An agent of the Australian Postal Corporation who is in charge of an office supplying postal service to the public;
10. A permanent employee of the Australian Postal Corporation with 2 or more years continuous service who is employed in an office supplying postal services to the public;
11. An Australian consular officer or an Australian diplomatic officer (within the meaning of the Consular Fees Act 1955);
12. An officer with 2 or more continuous years of service with one or more financial institutions (for the purpose of the Statutory Declaration Regulations, 1993);
13. A finance company officer with 2 or more continuous years of service with one or more finance companies (for the purpose of the Statutory Declaration Regulations, 1993);
14. An officer with, or authorised representative of, a holder of an Australian financial services licence, having 2 or more continuous years of service with one or more licensees; and
15. A member of the Institute of Chartered Accountants in Australia, CPA Australia or the National Institute of Accountants with 2 or more years of continuous membership.

Please note that copies of original documents cannot be certified by yourself or a family member.

Note 1: A notary public must put their registration number on the certified copy.